

Alta Vista Credit Union

Job Description – Member Service Associate/Teller

Job Title: Member Service Associate/Teller
Department: Member Services
Reports To: Branch Manager
FLSA Status: non exempt
Prepared By: Maria Burkitt
Prepared Date: January 2018
Grade Level: 4

SUMMARY

The Member Service Associate/Teller welcomes members to the branch, performs financial transactions, and provides opportunities to improve Member's financial lives by asking open ended questions, practicing active listening in order to uncover additional member needs and suggesting appropriate products and services. The Member Service Associate provides competent, courteous and concerned service to all external and internal members. Promotes a positive work environment in which member expectations are exceeded, teamwork is strengthened and personal growth of staff members is encouraged. The Member Service Associate provides superior member service to members and co-workers by displaying Alta Vista's core values of Honesty & Integrity, Caring, Dedication and Commitment, Accountability, Serving a Worthwhile purpose, and Responsibility, during all interactions.

Corporate DUTIES AND RESPONSIBILITIES

Include the following, other duties may be assigned.

- Adheres to Alta Vista's Personnel Manual guidelines and actively supports The Stakeholders reward compensation model.
- Consistently displays excellence in Member service and maintains a strong desire to provide opportunities to improve members' financial lives by providing beneficial, convenient, accurate and courteous service to members and co-workers alike.
- Takes individual responsibility for preserving the image of Alta Vista by maintaining a superior appearance of professionalism, cleanliness and organization.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Practices active listening skills and responds quickly to all member inquiries and requests. Explains and promotes other credit union products that fit individual Member's needs. Provides general information, cross sells products and services, and routes members to appropriate departments when needed.
- Keeps abreast of current Marketing promotions and actively participates in meeting goals associated with each promotion.

Alta Vista Credit Union

Job Description – Member Service Associate/Teller

- Receives checks, cash and other negotiable instruments for deposit. Verifies amount, uses available tools to combat fraud and examines checks for complete and proper endorsements.
- Cashes checks and pays out money after verification of signatures and customer balances have been scrutinized.
- Enters members' transactions accurately into computer to record transactions, and issues computer generated receipts.
- Places appropriate check holds in compliance with Alta Vista's check hold guidelines and Regulation CC rules.
- Daily balances cash and transactions accurately.
- Completes yearly regulatory requirement training and notifies Branch Manager of classes completed. Understand regulatory requirements and can demonstrate satisfactory knowledge of these laws and regulations and how they affect the job.
- Participates in all branch related duties such as: balancing ATMs, TCDs, TCRs, night depository, incoming mail, end of day, and other duties as assigned and needed.
- Displays a superior knowledge of all credit union products and services and identifies appropriate cross sell situations in which to offers such financial products and services. Consistently meets or exceeds sales goals set forth by the Branch Manager.
- Learns and maintains basic knowledge in order to trouble shoot problems.
- Refers members consistently to: Autoland, Alta Vista Financial Services, and other Alta Vista partners as well as artfully demonstrate for members Alta Vista's convenience/technology products such as: Bill Pay, Internet 24, Audio 24, Card Wizard and Main Street check services.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION and/or EXPERIENCE

High school diploma or general education degree (GED); or one to three months related experience and/or training; or equivalent combination of education and experience.

LANGUAGE SKILLS

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak effectively before groups of members or employees of organization.

Alta Vista Credit Union

Job Description – Member Service Associate/Teller

MATHEMATICAL SKILLS

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

REASONING ABILITY

Ability to apply common sense understanding to carry out detailed but uninvolved written or oral instructions. Ability to deal with problems involving a few concrete variables in standardized situations.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to stand; use hands and fingers to handle or feel; and talk or hear. The employee frequently is required to reach with hands and arms. The employee is occasionally required to walk and sit. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, and ability to adjust focus.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate.

Employee Signature _____

Supervisor Signature _____

Date _____